



## OSBORNE PARTNERS

Capital Management

### **Job Description - Client Service Specialist**

Growing investment management firm seeks a full time, experienced Client Service Specialist. This position can work from our Menlo Park or San Francisco office. Position is back-office/admin and typically not client-facing (think: emails/calls with clients and custodians regarding paperwork, *not* in-person meetings with clients explaining economy and investment portfolio – that's our Portfolio Counselor (CFP) role).

OPCM is a boutique investment advisory firm with approximately \$1.6 billion in assets under management as of 9/30/2019 and about 500 clients (families and institutions). Account minimum to invest is \$500,000 and average client's AUM is about \$3million. As an 80 year old firm, many of our clients have been with us for generations. We offer sophisticated investment management and active financial planning. We currently have 24 employees between our two offices and there are four Client Service Specialists. You will be assigned to support ~120 clients rather quickly. You'll work with all managers and departments.

We are seeking a candidate who is organized and professional, focused on details, and has experience in the financial services industry.

#### **Qualifications:**

- 3+ years of experience in the investment management, brokerage, or investment advisory/consulting industry required.
- 4-year college degree preferred.
- Experience working with custodians (Schwab, TDA, Fidelity) and Advent portfolio management software (APX) is a plus.
- Previous experience in professional client service is required.
- Have excellent interpersonal skills and excellent verbal and written communication skills.
- Demonstrates a high level of professionalism with confidential and sensitive information and all clients.
- Acute attention to detail.
- Ability to work on complex projects with general direction and minimal guidance.
- Ability to manage priorities and workflow and work independently.

#### **Duties may include but not limited to:**

- Assist with servicing client relationships:
  - o Provide client relationship management by monitoring client communications and completing client requests (move money, consolidating accounts, granting website access, etc.).
  - o Collaborate with client service team in preparation of client meetings (producing reports, gathering information).
  - o Communicate with clients verbally or in writing to inform or answer operational/administrative requests and inquiries and problem resolution.
  - o Monitor and initiate service requests with custodians on behalf of client.
  - o Assist opening and closing accounts, reregistering accounts, stock option exercise, restricted stock deposits, cost basis research, client gifting, processing RMDs, and distributions.
  - o Create portfolios in portfolio management system and update CRM (Salesforce) and internal systems with client data.
- Contribute to Quarter-End client reporting process (producing, reviewing and delivering all client reports).
- Oversee the correct execution of client service procedures for the firm. Continually research and implement more efficient and effective policies and procedures for client service/reporting expectations.

OPCM offers a strong compensation and benefits package. Compensation includes a competitive salary and benefits (medical, dental, and vision, along with 401K matching and a stock options plan).

**To be considered for this position your resume must be accompanied by a cover letter summarizing your experience and why your background would be a good fit for the position. Please submit all documents including salary requirements to [careers@osbornepartners.com](mailto:careers@osbornepartners.com). Thank you for understanding that no phone calls will be taken for this position.**